

Employee Post-Travel Disclosure of Travel Expenses

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Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The original *Employee Pre-Travel Authorization* (Form RE-1), AND
☐ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Alliance to Save Energy

Travel date(s): July 21, 2017

Name of accompanying family member (if any): NA

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$387.00	NA	\$45.78	NA
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	NA	NA	NA	NA
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

Please see attached pages.

8/11/17
(Date)

Morgan Cashwell
(Printed name of traveler)

Morgan Cashwell
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

8/11/17
(Date)

Angus King
(Signature of supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Morgan Cashwell

Employing Office/Committee: Sen. Angus King

Private Sponsor(s) (list all): Alliance to Save Energy

Travel date(s): July 21 - July 21, 2017

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Chicago, IL

Explain how this trip is specifically connected to the traveler's official or representational duties:

I handle energy policy issues for the Senator, and one of our priorities is energy efficiency. This trip will allow me to see first hand where energy efficiency technology is being developed, a training center where people are learning how to apply energy efficient policies to buildings and businesses, and a demonstration of how energy efficiency policies can be best implemented, all of which will be very helpful in my job as advisor on energy policy.

Name of accompanying family member (if any): None

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

6/21/17
(Date)

Morgan Cashwell
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Sen. Angus King hereby authorize Morgan Cashwell
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

6/21/17
(Date)

Angus King
(Signature of Supervising Senator/Officer)

	<p><i>Elizabeth Joyce, Strategic Partnership Builder, Shedd Aquarium</i></p> <p>The group will be meeting with Shedd Aquarium and Chicago-based Schneider Electric staff, to be followed by a private, efficiency-focused tour of the Aquarium. In 2013, the aquarium committed to an ambitious goal of cutting energy consumption in half by 2020. The Schneider Electric Building Management System (BMS) allows Shedd Aquarium to manage everything inside the building from lighting, via life support systems, to HVAC. The tour will allow participants to learn about how the applications of Schneider technologies are enabling different types of buildings and businesses to be more efficient.</p>
5:00 PM	Depart Shedd Aquarium for Dinner in Downtown Chicago/Waterfront Area
6:30 PM	Conclusion of Trip – Transportation to Chicago O’Hare Airport for flight back to Washington National Airport
8:00 PM	<p>American Airlines Flight 154* Departs for Washington National Airport</p> <p>*Possible flight – airfare not yet purchased</p>
11:00 PM	Arrive at Washington National Airport in Washington, DC

Policy Perspectives
Making the Business Case: How Data is Driving Energy Efficiency Investment in Chicago

Friday, July 21 | 9:00 am - 11:00 am

9:00 am - 9:10 am	Breakfast & Registration
9:10 am - 9:15 am	Welcome Remarks Dana Soukup, SVP, Field Operations, Building Technologies Division, Siemens Industry Inc.
9:15 am - 9:30 am	Keynote Remarks Representative Bobby Rush (D-III.)
9:30 am - 10:30 am	Making the Business Case: How Data is Driving Energy Efficiency Investment in Chicago Moderator: Stacey Paradis, Executive Director, Midwest Energy Efficiency Alliance Speakers: Val Jensen, Senior Vice President, Customer Operations, ComEd Brien J. Sheahan, Chairman, Illinois Commerce Commission Dana Soukup, SVP, Field Operations, Building Technologies Division, Siemens Industry Inc. Chris Wheat, Chief Sustainability Officer & Senior Policy Advisor, Office of the Mayor, City of Chicago
10:30 am	Closing Remarks Kateri Callahan, President, Alliance to Save Energy

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The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

- Private Sponsor Certification - Page 1 of 4

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

OR

☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Alliance to Save Energy, as the sole sponsor of this trip, was responsible for planning the trip in its entirety and staff members of the Alliance will accompany all participants throughout the duration of the trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

Please see attached.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Please see attached.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Please see attached.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$450	NA	\$74	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The trip involves an event that is arranged or organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Please see attached.

19. Name and location of hotel or other lodging facility:

NA

20. Reason(s) for selecting hotel or other lodging facility:

NA

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

For the purposes of this trip, the cost of meals and other incidental expenses will remain within the per diem limit set by the General Services Administration.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Attendees will take a plane to Chicago, which will be coach.

To attend sites in the greater Chicago area we will use public transit, mini bus or taxis for transportation.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

No entertainment will be provided to, paid for or reimbursed to Senate invitees by the Alliance to Save Energy.

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor:

Kateri Calum

Name and Title: Kateri Callahan, President

Name of Organization: Alliance to Save Energy

Address: 1850 M Street, NW, Suite 610, Washington, DC 20036

Telephone Number: (202) 857-0666

Fax Number: (202) 334-9588

E-mail Address: kcallahan@ase.org

For questions, please contact Reed Brown at rbrown@ase.org or (202) 530-2241.

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- Field trip to New York and California that took place from November 30, 2004 – December 3, 2004.

15.

The Alliance hosts a range of educational activities.

- **Congressional Briefings**
 - We host Congressional briefings throughout the year, which typically focus on a particular aspect related to energy efficiency.
 - March 16, 2017: Beyond Roads & Bridges: The Role of Energy Efficiency Policy in Infrastructure Investments
 - July 14, 2016: Congressional Briefing on Grid Edge: The Role of Energy Efficiency in a Modernizing Energy System
 - February 26, 2016: The Role of Benchmarking, Transparency and Codes in Driving a More Efficient Built Environment.
 - January 14, 2016: Cutting Edge Technologies and Businesses: Opening the Door for Energy Efficiency Deployment at Scale
- **Energy Efficiency Global Forum**
 - An annual event convened in Washington, DC that brings together executives and policymakers from around the world and across sectors to discuss energy efficiency. In 2017, this exclusive forum explored how utilities, regulators, legislators and companies are incorporating cost-effective energy efficiency measures into their business to help meet increasing demand. The next EE Global Forum is scheduled for May of 2018 in Copenhagen, Denmark.
- **Accelerate Energy Productivity 2030**
 - A partnership between the U.S. Department of Energy, Alliance to Save Energy and Council on Competitiveness to catalyze action in the public and private sectors to help achieve the goal of doubling our nation's energy productivity.
 - As part of this initiative, three webinars were held in April to provide an in-depth look at several unique aspects of energy efficiency:
 - April 13, 2016: Building Technologies and Finance
 - April 20, 2016: Smart Grid and Smart Manufacturing
 - April 27, 2016: Transportation and Water
- **Energy 2030 Events**
 - Energy 2030 *On the Road* – These are education, outreach and action campaigns aimed at urging communities through the nation to adopt the goal of doubling U.S. energy productivity. They are held around the country and last year included stops in Seattle, WA, Raleigh, NC and Minneapolis, MN. They follow the same format of other events where panelists discuss a specific theme of energy efficiency and are widely attended by members of local governments, academia, local and state government and the surrounding community.
- **Policy Perspectives Breakfasts**
 - Breakfast sessions where we invite a representative from a Federal agency or Congressional office (Senator/Congressman) to come and speak about priorities or updates regarding energy efficiency for the respective agency or office. There

are plans for several of these events in 2017, including in Washington, DC and around the country.

18.

- The American Council for an Energy-Efficiency Economy (ACEEE) produces the annual State Energy Efficiency Scorecard, which ranks states based on energy efficiency policies and practices. Illinois has consistently been in the top 10, and ranked #13 in 2016. The state offers loan and bond programs to encourage energy efficiency, and leads by example by requiring efficient fleets and public buildings. The state has several ongoing energy performance contracts. Research focused on energy efficiency occurs at several research centers in Illinois. In addition to the state ranking, ACEEE also ranks a selection of major cities on the same criteria and Chicago was ranked #7 in 2017. Therefore, Chicago is an excellent option for such a trip because we can incorporate strong local level actions along with the broader state-level actions.
- The Alliance to Save Energy is also hosting a public briefing in the Chicago metro area on July 21, which will be included as part of the agenda. The briefing is entitled, “Making the Business Case: How Data is Driving Energy Efficiency Investment in Chicago,” and will feature speakers from state and local government, regional organizations and local business leaders. A full agenda for the event is included below.
- The Greater Chicago area boasts a wide range of field examples and opportunities to learn about energy efficiency, including:
 - ComED
 - Commonwealth Edison Company (ComEd) provides electric service to approximately 3.8 million customers across northern Illinois, or 70 percent of the state’s population. ComEd is a subsidiary of Exelon Corporation (NYSE: EXC), the nation’s leading competitive energy supplier.
 - The Chicago Training Center, and its sister facility in Rockford, were made possible by the smart grid law passed by the Illinois General Assembly in 2011. The smart grid law opened the doors for ComEd to modernize its 100-year old electric delivery system and provide customers with improved power reliability and more programs and options to manage electricity usage, while also enhancing economic development in Illinois and building smart infrastructure for the future. The new facility is the second training center that ComEd has built from the ground up in its 130-plus-year history. It is specially designed to educate and train the workforce of the future.
 - Schneider Electric & Shedd Aquarium
 - Schneider Electric is the global specialist in energy management and automation. Schneider Electric develops connected technologies and solutions to manage energy and process in ways that are safe, reliable, efficient and sustainable. The Group invests in R&D in order to sustain innovation and differentiation, with a strong commitment to sustainable development.

- Shedd Aquarium in Chicago, IL is currently home to more than 1,500 species, including fish, marine mammals, birds, snakes, amphibians, and insects from all over the world. In 2013, the aquarium committed to an ambitious goal of cutting energy consumption in half by 2020. Achieving that goal meant conducting extensive research and analysis to identify problem areas. The Schneider Electric Building Management System (BMS) allows Shedd Aquarium to manage everything inside the building from lighting, via life support systems, to HVAC.